

Client Intake — Website (Technical)

TMG2S — Managed Web & Security · for IT-savvy clients

Client:

Date:

Prepared by:

A lean intake for technically literate clients. Answer what applies; check boxes where offered. Do not put credentials on this form — we'll send an encrypted vault link for account access.

1. Entity & Contact

Legal / business entity name:

DBA:

Primary technical contact (name / title / email / phone):

Decision-maker for sign-off (if different):

2. Domain & DNS

Registrar:

☐ We own it ☐ Need to register

Who controls DNS today?:

Can TMG2S take over DNS management?

☐ Yes ☐ No ☐ Delegate specific records only

Move DNS to Cloudflare?

☐ Yes ☐ No ☐ Discuss

Existing critical records to preserve (verification TXT, SPF/DKIM/DMARC, etc.):

3. Hosting & CMS

Current host / platform:

Current CMS / framework:

What is replacing it (new stack, or TMG2S-managed):

Anything on the current host that must migrate (databases, redirects, assets, cron jobs):

4. Email / Mail Routing (so we don't break mail)

Email / MX provider:

Number of mailboxes / aliases:

Confirm

Mail must remain uninterrupted during cutover

SPF / DKIM / DMARC currently published?

Yes No Unknown — audit needed

5. Analytics, Pixels & Tags

Current analytics

GA4 Other None

Tag manager in use?

GTM Other None

Marketing pixels to preserve (Meta, Google Ads, LinkedIn, etc.):

6. Integrations & APIs

Payments

Stripe (existing account) Other None yet

Booking / scheduling:

CRM:

Email marketing / newsletter:

Other APIs / webhooks / third-party services:

7. Brand Assets Available

Vector logo (SVG / AI / EPS)

Web-res logo (PNG)

Favicon

Brand fonts (files or license):

Color hex values / brand guide:

Image/media rights & people shown — confirm licensing for all supplied imagery, and identify/label any identifiable people plus model-release/likeness permission:

8. SEO Must-Preserves

Top URLs by traffic (paste or attach):

301 redirect map needed?

Yes (provide old→new)

No

Current rankings / keywords to protect:

Existing sitemap.xml / robots.txt to carry over?

Yes

No

9. Accessibility & Compliance

Target standard

WCAG 2.1 AA

WCAG 2.2 AA

Other

None specified

Regulatory requirements (ADA, GDPR/CCPA, HIPAA, PCI, sector-specific):

Cookie consent / privacy policy needs:

10. Content

Who provides the copy?

Client TMG2S Mix

Copy source / format (docs, existing site scrape, CMS export):

Photography / media source:

11. Access & Environments

Staging environment required?

Yes No (TMG2S staging is access-gated by default)

Access to share (via encrypted vault — do NOT list here): registrar · host · DNS · GBP · analytics · social · repo

Version control / repo handoff needs:

12. Timeline

Target launch date:

Hard deadlines / events driving the date:

Change-freeze windows (peak season, campaigns, fiscal close):

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